MarketPlace 11.2 Release/Upgrade Notes

GENERAL ENHANCEMENTS

ACCOUNTING CODE FAVORITES

Summary of Feature:

Charging to different accounting codes on a requisition can be cumbersome for users. With the 11.2 release, users can store combinations of favorite accounting codes in their profiles and access them on the cart. Users who buy for different projects or who split purchases across different codes can store these frequently used combinations on their profiles and quickly select to use them during checkout.

Key points of Feature:

This feature is ON (enabled) by default, but is optional for use.

Users with the permission to “Edit My Profile” and the permission to “View Personal List” for any code custom field have a new tab on the profile called Code Favorites located next to the Codes tab. This tab appears on the profile under Purchasing -> Custom Fields.

- SETUP: In this section, the user can store combinations of accounting codes in their profile (e.g. index combination). Split percentages can also be available to store with the codes.

A code favorite is given a name by the user in order to be easily identified on the profile or the cart (similar to how other “favorites” can be named in the system).

Users can create unlimited code favorites. Code favorites can be deleted from the profile as well.

- CHECKOUT: Users can pull from their code favorites list during checkout, speeding up the requisition process for users with access to multiple codes.

When a user has code favorites stored in the profile, a dropdown will appear on the accounting codes section listing the code favorites by name. The user can choose a code favorite and the accounting codes section will populate with the values for that favorite including splits.

A code favorite can be saved as a default and automatically pulled into the accounting codes section of each draft cart.

Users can still access the personal list for each custom field instead of using code favorites.

If there is not a default code favorite, the checkout will use the defaults set for each field under Custom Fields Codes - Edit Personal List.

Code Favorites are only used during the checkout process. The name of the code favorite is not visible on the requisition document.

This feature only affects accounting code type fields. The code favorites section appears for any group of fields from the requisition document with splittable or grouped custom field elements.

VIEW ALL DOCUMENT COMMENTS /HISTORY IN A SINGLE LOCATION

Summary of Feature:

Reviewing the Comments and History for an order is a common way to track status and view an audit trail of events. Previously, Comments and History could only be viewed for one document at a time. For example, while viewing a PO, you were required to open the associated PR to see the earlier history for the purchase. With the new feature, users can select to view all comments or history to see all of the associated information for all document types (currently requisition and purchase order, and eventually invoice and receipt). This provides the ability to see all related comments on a single comments tab and saves valuable time toggling to different screens

Key points of Feature:

This feature is ON (enabled) by default and cannot be turned-off.

The comments and history tabs will always default to the document that you are currently on. If you are on a requisition then you will default to seeing requisition comments and history first.

From a purchase order, you can now see all comments related to the requisition and receipt [for the supplies manager module only] that correspond with that purchase order. The same applies for requisitions. From any requisition you can see all comments that are related to the POs and receipts that pertain to that requisition. From the receipt you can now view all comments related to that receipt and its associated requisitions, purchase orders, and requisitions.

The same applies to the audit trail (History tab). From any requisition, purchase order or receipt you can now see the audit trail for all documents on a single tab. This gives users the ability to view the complete history for all documents without having to go to each document.

A record count exists that will indicate the total number of comments or history that you are viewing. This record count will update as you change the filter for different document types. The count on the comments tab goes away if you navigate away from the native document. For example, if you are viewing a requisition that has four comments, the comments tab will indicate that there are four comments. If you change that to view all comments, then the count on the comments tab will go away.

All other filters such as the date and action filters for the audit trail will still work in addition to the filter by document type. You can still specify a date range but indicate that you want to view the history for all documents.

VIEW FUTURE REQUISITION NUMBER FOR A CART

Summary of Feature:

A new option is available that allows users to view the "future" requisition number for their cart. This allows users to see what their requisition number will be prior to the requisition actually being created. The cart number is exposed on the draft cart itself, the draft carts page, and the assigned cart page. By having the number available in the draft cart it allows users to have a reference number. This number can be used when trying to find the cart later and administrators can search by this number. For customers with Requisition Manager, it will eventually become the requisition number.

In addition to exposing the cart number in the user interface, administrators can now search for draft carts by the cart number. This allows users to provide a cart number for reference so that others can find that particular draft or assigned cart.

Key points of Feature:

With the setting enabled, a new column appears for the cart number when looking at your draft or assigned cart lists indicating the cart number. You can click on that cart number for a printer friendly version of the cart.

COPY ADDRESSES FROM THE HEADER TO ALL LINE S

Summary of Feature:

As an approver or an administrator, you may want to set the shipping address on each line to be the same as the header to save on shipping costs. New functionality is available that allows you to copy the address information from the header and apply that address to all lines. This saves valuable time when wanting to basically reset all the addresses for each line to the same value as the header.

Key points of Feature:

This feature is ON by default and cannot be turned off.

If the user has the ability to edit the cart or requisition, they can perform this new action of copying the addresses to the lines.

This feature applies to both Shipping and Billing addresses. You can perform this action on a draft cart as well as a requisition currently in the approval process. To perform this task while in the approval process, assign the requisition to yourself and then copy the address(es) to each line.

A link appears in the shipping and billing section that says Copy to Other Lines. This link appears when a line contains a different address than the header. When you click the link to copy to other lines, you are presented with a window that allows you to select which lines you wish to copy the address to.

APPROVAL ENHANCEMENTS

- An enhancement available with the 11.2 MarketPlace release is to provide a more detailed email notification for documents pending approval. It allows approvers the ability to see detailed order information and determine when it is appropriate to log into the site and take action.

- Approvers can now filter their documents awaiting approval by account, index, fund or commodity code.

DETAILED APPROVAL EMAIL NOTIFICATION

Summary of Feature:

Approvers will receive an enhanced email notification containing order and line information. This allows the approver to see detailed order information quickly and easily.

Key points of Feature:

Enhanced emails replace the basic pending approval email notification for all approvers.

- A user must have the following permissions/email notifications enabled in order to approve and receive emails regarding requisitions:

Associated permissions: Approve/Reject Requisitions, AND be in an approval queue.

Associated email notifications: User must have "PR pending Workflow approval email notification" enabled.

FILTER APPROVAL QUEUES BY CUSTOM FIELDS

Summary of Feature:

In the application today you can specify which custom fields you can search by in document history: purchase requisitions, purchase orders, and invoices. By doing that it allows you to search for documents by specific custom fields. With 11.2, approvers can filter their approval queues by custom fields. As an approver, you could potentially have a large number of requisitions to review, which could be cumbersome to sort through on the screen. If you are only interested in reviewing requisitions that contain a certain account code string value, for example, you can now perform that search and view those orders.

Key points of Feature:

When you are filtering approvals by a specific custom field, a “breadcrumb” listing displays at the top of the folder list. This lets the approver know what orders they are currently viewing.